

ENVESTNET OFFERS ASSET MANAGERS A UNIQUE PORTAL TO VIEW AND MANAGE BUSINESS ACTIVITY IN REAL-TIME

Offering serves as a gateway to efficiently scale distribution and to more effectively connect asset managers with financial advisors

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Envestnet, a leading provider of wealth advisory solutions to more than 20,000 financial advisors, today launched a new business console geared towards the asset manager. The Envestnet Manager Portal (EMP) enables asset managers the ability to view comprehensive activity reports for specific portfolio strategies as well as a platform to create and maintain them in real-time. The EMP is a unique gateway for asset managers to efficiently scale their distribution, service client accounts, and increase exposure with financial advisors.

“Envestnet is bridging the gap between the asset manager and financial advisor,” said Viggie Mokkarala, Executive Vice President, Envestnet. “This console is a powerful tool for asset managers. With the EMP, asset managers are able to manage portfolios, provide services to financial advisors, and access business building reports that can help them grow relationships.”

Through the EMP, portfolio management and account services have been placed at the forefront. Asset managers can now effectively modify portfolio strategy positions, specify alternatives for account customization, view composite performance, view daily account analyses as well as trade confirmations, and track historical portfolio strategy changes.

“We have more than 20,000 registered users on our platform,” said Bill Crager, President, Envestnet. “What we’ve done is allowed the asset manager to directly access those advisors utilizing their specific products –

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allowing them a more hands-on approach to managing the needs of their clients.”

Bill Cantus, Business Development Director, Russell Investment Group, explains, “We partnered with Envestnet for a variety of reasons, not the least of which was their technology and reporting capabilities. The EMP has been a great example of this. The portal provides me the ability to manage my sales staff appropriately, to focus on the right distribution partners and highest opportunity prospects, and leveraging the remainder of the Envestnet organization for a broader reach. This will create a true win-win for our organization and Envestnet.”

An important component of Envestnet’s new offering to managers is the launch of the firm’s enhanced content hub (investnetadvisor.com) launched earlier this month. Distributed monthly to financial advisors and available at all times, the new Web site offers managers increased exposure by showcasing the content developed specifically around their portfolio strategies.

Mokkarala further comments, “As a partner to financial advisors, we understand the importance asset managers play in the investment portfolio process. Through the EMP and other services, Envestnet is building a bridge that will contribute to the highest level of service and support to our advisors.”

ABOUT ENVESTNET ASSET MANAGEMENT

Envestnet Asset Management, one of the largest providers of wealth management solutions in the industry, delivers separately managed accounts, mutual funds, mutual fund wrap portfolios, multi-managed accounts, ETFs, fixed income solutions, sustainability solutions and alternative investments to independent financial advisors. Envestnet’s investment offerings are supported by a proprietary technology platform



that delivers customized advisor web sites, consolidated views and comprehensive reporting abilities to the nation's independent investment advisory firms. Envestnet is headquartered in Chicago with offices in Denver, Los Angeles, New York, Silicon Valley and Trivandrum, India.

Envestnet has more than \$45 billion in assets under management and administration with over 440,000 investor accounts.*

**Data as of 12/31/2007*

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